CORE

The Voice of Mineral Exploration/Fall 2014

S-IMEW 2014: AN INSIDER'S PERSPECTIVE

PDAC 2015 CONVENTION NEWS AND HIGHLIGHTS

HOW GOVERNMENT IS BOOSTING CANADA'S GLOBAL TRADE

Discovery rates: Challenges and opportunities

PDAC
PROSPECTORS & DEVELOPERS ASSOCIATION OF CANADA

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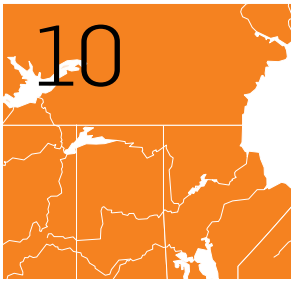

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INDUSTRY NEWS

SUPREME COURT OF CANADA DECISION IN *TSILHQOT'IN NATION V. BRITISH COLUMBIA*

On June 26, the Supreme Court of Canada (SCC) released its decision in the ***Tsilhqot'in Nation v. British Columbia***, addressing the issues of Aboriginal title and provincial jurisdiction over title lands. For the first time, the SCC granted a declaration of title over an area where the Tsilhqot'in were able to establish Aboriginal title and also confirmed that provincial laws of general application continue to apply to the title lands however, subject to s.35 of the ***Constitution Act, 1982*** and the infringement and justification framework previously determined by the SCC in the *Sparrow* decision.

Supreme Court of Canada decision in *Grassy Narrows First Nation v. Ontario*

On July 11, the Supreme Court of Canada ruled on the ***Grassy Narrows First Nation v. Ontario (Natural Resources)*** case, upholding the decision that Ontario has the authority to take up lands in the Keewatin area so as to limit the harvesting rights under the treaty. The Court held that the province can take up Treaty 3 land, and regulate it in accordance with the treaty and its obligations under s. 35.

GOVERNMENT OF AUSTRALIA INVESTS $125 MILLION IN ITS ENERGY AND RESOURCE SECTOR

The Government of Australia unveiled its 2014-15 federal budget in May. Included in the budget was a $125 million investment in the energy and resources sector—$100 million of which would be earmarked for the exploration and development of new mineral deposits.

The federal budget honours the government's commitment to provide $100 million for the Exploration Development Incentive, which would fund exploration for new mineral deposits. The incentive aims to provide small exploration companies with better access to capital from private sector investors through a refundable tax offset for greenfield exploration costs.

QUEBEC COMMITS TO RESOURCE REVENUE TRANSPARENCY

In June, the newly appointed Québec government tabled its 2014-2015 budget. It was announced that the Québec government will participate in the federal government's initiative on mandatory reporting standards for extractive companies. The Ministère des Finances and the Ministère de l'Énergie et des Ressources naturelles will work with the Autorité des marchés financiers to implement this initiative to facilitate public access to information in the mining sector.

The PDAC released recommendations on mandatory reporting of payments in January 2014 as part of the Resource Revenue Transparency Working Group and continues to advocate for their implementation.

CMIC REACHES MILESTONE IN ENVIRONMENTAL PROJECT DEVELOPMENT WORK

The Canada Mining Innovation Council (CMIC) released two project pre-feasibility reports in June by the Closure Working Group (CWG) and the Water Working Group (WWG) of its Environmental Stewardship Initiative (ESI). The completion of the pre-feasibility studies represents a major milestone for the ESI's work following the completion of an environmental management scoping study (prepared by Hatch Ltd), several multi-stakeholder surveys, and ongoing ESI workshops.

The objectives of the studies are to assess the initial feasibility of the following project concepts:

Closure Working Group

1) Standardized closure criteria for mine site relinquishment to the Crown
2) Passive systems for managing acid rock drainage (ARD)

Water Working Group

3) National database/repository of water resources information
4) Remote, real-time sensors for water quality monitoring

COOPERATIVE CAPITAL MARKETS REGULATORY SYSTEM

The governments of Saskatchewan and New Brunswick announced in July that they will join Ontario, British Columbia and the federal government in the establishment of a common regulator for Canada's capital markets: the Capital Markets Regulatory Authority (CMRA). The CMRA seeks to create a harmonized regulatory system for capital raising across Canada that is efficient and will contribute to economic growth.

New technology to cut mineral exploration drilling costs by 85%

A revolutionary technology developed in Australia is expected to slash remote greenfield drilling exploration costs by 85% within four years, and turn around the nation's waning competitiveness in the mining sector. The DET CRC solution is a greenfield coiled tubing (CT) rig that will be able to drill to 500 metres at a rate of $50/metre by 2018. The new coiled tubing rig will be smaller than conventional rigs and accompanied by real-time assay/evaluation. Analysis conducted by NextGen Geological on behalf of the DET CRC examined the exponential growth of drilling costs and the impact DET CRC's CT rig would have in reducing them. The study suggests an 85% saving for remote greenfield drilling programs.

Rediscovering its swagger

A look at how Canada's minerals industry can adapt in the face of uncertainty

BY VIRGINIA HEFFERNAN

Canada's mineral exploration sector is in crisis. Despite record amounts of spending in recent years, discovery rates are either stagnant or declining.

To make matters worse, the country's metal reserve base, which has been in gradual decline since the 1980s, is set to shrink even further, leading to job losses and a deteriorating GDP if mining's $50 billion annual contribution to the Canadian economy wanes.

"The issue is now becoming urgent," noted Richard Schodde, Managing Director of Australia's MinEx Consulting, in his keynote address to the Quebec Mineral Exploration Association Conference this past November. "Of concern is whether there is enough time left to discover and develop new mines before the existing ones close."

It will take the collective will of the mineral industry and financial sectors, along with governments and academia, to accelerate the rate of discovery and development. There are several ideas about how to tackle the challenge and some initiatives are already in motion, but first let's look at the reasons behind the widening gap between exploration spending and discovery.

MINERAL DEPOSITS ARE HARD TO FIND

The fundamental problem in Canada is that most of the deposits with surface expression and/or easy accessibility have been found. Explorers are now faced with both the technical complexity of looking for deeper deposits and the higher costs of working in remote regions with poor accessibility.

EASY MONEY CHASING MARGINAL PROJECTS

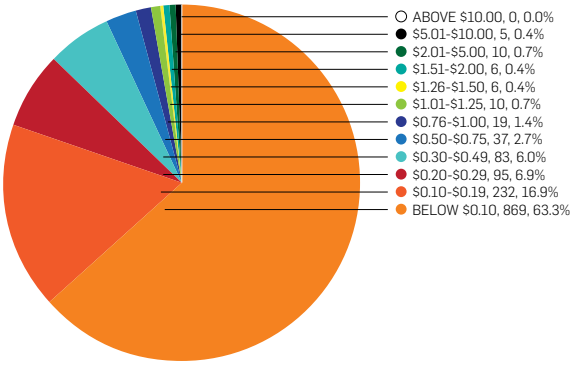
The commodity "supercycle" of the past decade encouraged investors to funnel money into the mineral industry and companies to spend that capital on existing deposits with marginal upside, or on high-risk exploration projects. As a result, although exploration spending in Canada reached a record $4.25 billion in 2011 (ten times the level in 2001), the number of discoveries has remained stagnant.

"Companies are focusing on more later stage projects where the defined resource might increase 20% to 30%, not what we consider a significant discovery," says Mark Ferguson, an analyst for SNL Mining & Metals who defines a "significant" find as one, for instance, of more than two million ounces of gold or half a million tonnes of copper.

Price Range Breakdown

Active TSX-V listed KRO Companies
(Price Range, #Cos, % of Total)

Companies less than $200.00 WC: 802
Producer & > $200.00 WC: 14
Resource Feasibility > $200,00 WC: 196
Discovery Exploration > $200,00 WC: 309
"Shells" with > $200,000 WC: 51



Source: Kaiser Research Online

DISCOVERY COSTS ESCALATING

The cost of making that type of discovery has more than doubled over the past decade. More stringent permitting and more extensive community consultation activities add expense, while prices for labour, fuel and equipment have skyrocketed. Schodde estimates that the average diamond drilling cost per metre in Canada, for example, is $230 compared to $92 at the turn of the century.

"Before, you could access land that had a surface outcropping and was close to a transportation hub and just start exploring," says PDAC President Rod Thomas. "Now, companies incur greater costs by either looking for deeper deposits in established camps, or looking for surface deposits in remote areas far from transportation routes. This can raise exploration costs by a factor of six for some very remote projects."

The cost of exploring deeper, and in remote regions with poor access and extreme climates, has challenged the ability of many juniors to finance grassroots programs for the time it takes to find a significant deposit. John Kaiser, Editor of *Kaiser Research Online*, estimates that companies need at least $500,000 to generate a target and another $1 million per year to test it.

INVESTORS ABANDONING THE SECTOR

That level of financing is no longer available to many of the more than 1,300 junior companies listed on TSX Venture exchange (TSX-V). Despite being the source of 82% of the country's discoveries in the past five years, according to Schodde, increasingly risk-averse investors have shifted their capital to other sectors with a more comfortable risk/reward ratio.

As a result, financing for junior mining companies listed on the TSX-V dropped from $4.1 billion in the first half of 2011, when exploration spending reached its peak in Canada, to less than $1 billion in the first half of 2014, according to the statistics published by the TMX's Market Intelligence Group (MiG). Not surprisingly, 58% of the 1,372 TSX-V companies Kaiser tracks have working capital of less than $200,000, and many of those are in the red. "Right now, the glass is worse than half empty, it's empty," says Kaiser.

HOW DO WE REVERSE THE TREND?

The potential solutions are as complex as the challenges and will require innovation by both the public and private sectors. Canada already has a competitive advantage over most jurisdictions because of its unique flow-through tax incentive for mineral exploration, but more must be done to discover and develop the country's mineral resources without wasting available capital.

How Does Canada Compare to the Rest of the World?

Spend and performance by region: 2003-12

i.e. "Bang-per-Buck

Region	Exploration Spend (2012 $b)		No. of Discoveries#		Tier 1+2 Discoveries		Estimated Value (2012 $b)		Value/ Spend
Australia	$12	10%	84	15%	14	17%	$13	14%	1.12
Canada	$21	18%	74	13%	15	18%	$15	16%	0.71
USA	$9	8%	19	3%	6	7%	$5	6%	0.60
Latin America	$27	23%	133	24%	15	18%	$23	24%	0.84
Pacific/SE Asia	$6	5%	23	4%	2	2%	$4	4%	0.63
Africa	$16	14%	124	22%	20	24%	$22	24%	1.38
W Europe	$3	3%	24	4%	1	1%	$1	2%	0.48
Rest of World	$22	19%	78	14%	11	13%	$10	11%	0.46
	–	–	–	–	–	–	–	–	–
TOTAL	$116	100%	559	100%	86	100%	$94	100%	0.81

Note: Analysis excludes Bulk Minerals, and excludes satellite deposits found within existing camps
Discoveries refer to Moderate-, Major- and Giant-sized deposits.
The Estimated Value is approximate only, and ignores the value of unreported discoveries.
Source: MinEx Consulting © November 2013

IMPROVE ACCESS TO CAPITAL

The federal government's Flow-Through system allows companies to deduct 100% of their Canadian eligible exploration expenses (CEE), then "flow-through" those expenses to investors who can claim them against personal income. Companies are also eligible for an added 15% federal credit, called the Mineral Exploration Tax Credit (METC), for exploration completed from or above surface.

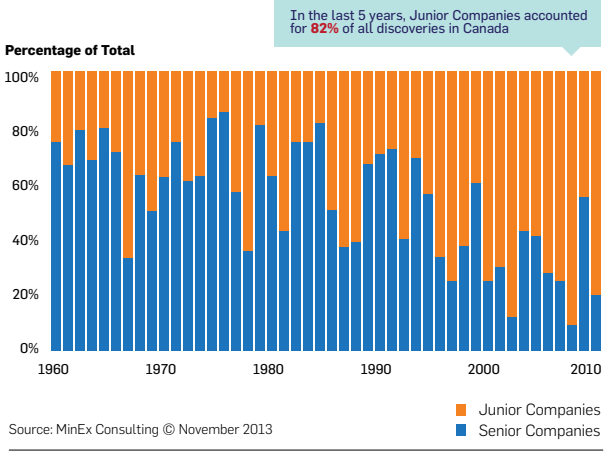
"Perhaps there is a way to modify the program to encourage companies to spend flow-through money on greenfields areas, or sets of claims that do not have a defined resource," says SNL's Ferguson. In keeping with this theme, the PDAC is advocating for an enhanced METC for projects in northern Canada, where costs are often significantly higher.

Flow-through could contribute to the more advanced stages of exploration and development too, adds Jason Attew, Managing Director of Investment Banking for the Metals and Mining Group of BMO Capital Markets. "If you have a feasibility ready project with a significant capital cost, it would be helpful for flow-through financings to, in some circumstances, include a broader definition of applicable development expenditures which would have higher near-term deductibility for the investor."

Some of the provinces are already moving towards targeted incentives, from Newfoundland and Labrador's enhanced grants for remote or greenfield exploration to Quebec's new $250 million fund for development projects.

Deposits Were Found by a Range of Company Types

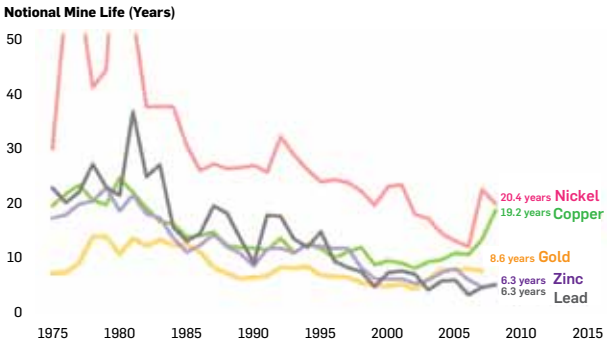
Mineral discoveries in Canada: 1960-2012



Source: MinEx Consulting © November 2013

"The potential solutions are as complex as the challenges and will require innovation by both the public and private sectors."

Trends in the Average Mine-Life for Canada



Note: Notional Mine Life is the ratio of Current Reserves to the Current Mining Rate, and assumes 90% recovery factor during mining and processing.
Source: MinEx Consulting © November 2013 based on date from NRCan

REFORM SECURITIES REGULATIONS

Exploration requires capital, but capital has been elusive of late, particularly for companies with grassroots exploration projects.

The sector could tap into a broader base of investors if the requirement for an expensive prospectus was waived in certain circumstances; when money is available from friends and family, for instance, or through crowdfunding.

The new Canadian Securities Administrators (CSA) exemption that allows any shareholder, regardless of their net worth or professional background, to commit $15,000 a year to financing is a step in the right direction, as are the recent exempt market proposals that have been generated by regulators across Canada.

As an alternative, Kaiser sees a role for royalty companies currently sitting on cash to form exploration alliances with prospect generating juniors. The idea is for the financier to provide capital for generative exploration in exchange for a 1% royalty on any new projects, with the option to earn an equal share of the project by providing ongoing capital. Callinan Royalties, for instance, is using this model to generate prospects in Nevada, Mexico, Portugal and Ireland.

A capital crisis can also be an opportunity for the financial industry to channel money towards companies with good management teams. "The financial sector has a gatekeeping role in vetting management's track record of success," says Jason Attew, Managing Director of Investment Banking for the Metals & Mining Group of BMO Capital Markets. "We're in the part of the cycle where efficiency and cost discipline is key. Parties that have a focused program and a proven ability to translate mineralization at the drill bit into reserves and resources will attract the capital." PDAC is also undertaking research to assess whether the financial industry rewards companies that are deemed to be socially and environmentally responsible.

MAXIMIZE THE LAND-BASE AVAILABLE FOR EXPLORATION

Successful exploration requires mineral explorers to have access to large tracts of land to search for and locate potentially economic deposits. The removal of potentially prospective lands reduces the chances of exploration success, impacting Canada's ability to replenish its metal reserve base. Initiatives such as the federal government's Mineral Resource Energy Assessments (MERA) process, which evaluates the resource potential of lands proposed for permanent protection, are vital to ensuring withdrawal decisions are made in a manner that balances conservation values with resource development opportunities.

Provincial and territorial governments can also increase the land available for exploration by implementing policies that discourage companies from holding onto claims they are not actively exploring. In British Columbia, for example, the exploration expenditures required to keep a claim in good standing are much less than the payment required to hold onto an inactive claim.

CLARIFY CONSULTATION PROCESSES

An important aspect of land access is the industry's role in the Crown's duty to consult with Aboriginal groups, but there is little clarity as to how this should translate into activity on the ground. The ambiguity that exists around key elements such as roles, responsibilities, timelines, funding, accommodation and adequacy is a significant barrier to the mineral sector's ability to access land for the purposes of exploration, and their ability to develop their projects from grassroots projects into operating mines.

Clarity regarding the consultation process will help lead to stronger relationships, project certainty, and mutual benefits for companies and communities. The PDAC is currently reviewing consultation policies from each of the jurisdictions in Canada to better understand some of the related challenges and will be working with governments to address them.

"We're in the part of the cycle where efficiency and cost discipline is key. Parties that have a focused program and a proven ability to translate mineralization at the drill bit into reserves and resources will attract the capital."

INVEST IN INFRASTRUCTURE

The continued sustainability of the mineral industry is hampered by infrastructure deficiencies, particularly in remote and northern parts of Canada. At the exploration stage, infrastructure gaps make accessing potentially prospective lands extremely costly. Exploration projects that are more than 500km from a transportation route or supply centre face costs that can be 600% higher than projects that are less remote, according to a recent study done by PDAC. Even when a discovery has been made the infrastructure deficit can create the need for very large initial capital investments, which makes otherwise economic deposits unviable.

"There are, for example, hundreds of millions of tons of stranded base metal resources in the Selwyn Basin in the Yukon Territory, in the Northern Slave geological province in Western Nunavut, and in the Ring of Fire area in northwestern Ontario," notes PDAC President Rod Thomas. "These deposits could be developed into mines if there was adequate infrastructure and supporting commodity prices. In that sense, declining discovery rates are only part of the explanation for declining reserves."

Although mining-specific infrastructure development would lead to numerous public benefits (GDP growth, employment, business development, tax and royalty revenues) it rarely meets the "public use" test of existing federal programs, such as the Building Canada Plan. As such, the PDAC is recommending that the current financing gap be addressed through the establishment of a northern infrastructure development financing authority, mandated to provide long-term financing (loans, bonds, equity investment) to northern infrastructure projects that generate public benefits but do not meet the "public use" criterion of existing federal programs.

FOSTER INNOVATION

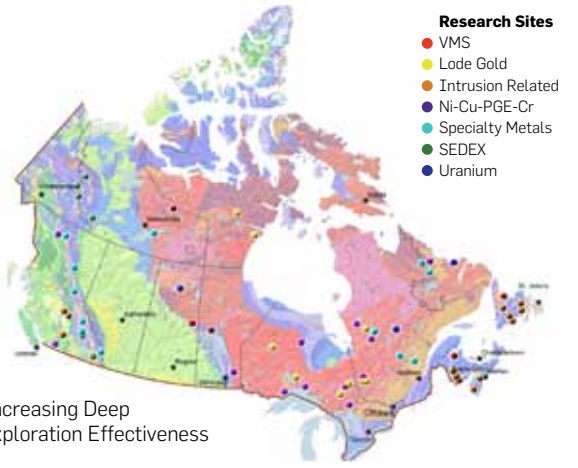
Both the public and private sector play a role in devising innovative solutions to the challenge of fewer discoveries.

The federal government's Targeted Geoscience Initiative (TGI), for instance, is attempting to reduce the risk and cost of deeper exploration by finding ways to determine whether a geological setting contains buried mineral deposits and to more accurately target those deposits. The program has a training component designed to increase the number of highly qualified personnel available to recognize and test prospective areas.

Similarly, the Canadian Mining Innovation Council (CMIC) has introduced the Footprints Project. Funded by a $5.1 million NSERC grant, as well as industry contributions, the project's goal is to improve the odds of finding buried mineral deposits by identifying subtle indicators, or footprints, in the rocks surrounding known orebodies that can be used to guide exploration.

On an individual company level, companies such as Hudbay Minerals are using sophisticated data management systems to weed through decades of historical results in the hopes of "discovering" new mines within the databank, while software providers such as Geosoft are improving 3D-modelling techniques to better see below cover.

Targeted Geoscience Initiative



Source: NRCan

ENHANCE REGULATORY EFFICIENCY

There is a great deal of room to improve regulatory efficiency and coordination between federal and provincial regulators. In response to unpredictable and unclear regulations for exploration and mining in the Northwest Territories, for instance, the federal government launched the Northern Regulatory Improvement Initiative to enhance regulatory regimes in the north.

The Government of Canada has also made amendments to a number of other federal pieces of legislation, including the Canadian Environmental Assessment Act (2012), the Fisheries Act, and the Navigation Protection Act. The full impact of these recent legislative changes to exploration and development projects remains uncertain. Concerned that the new fisheries regime and the implementation of the Species at Risk Act has the potential to lead to unnecessary regulatory burden and longer development timelines, the PDAC is seeking greater clarity.

LOOKING FORWARD

Although discovery rates are declining worldwide as a result of a complex web of geological, financial, regulatory and social matters, the gap between expenditures and success is growing particularly wide in Canada. Both the public and private sectors must become more innovative in their approach to raising exploration capital, accessing remote areas, and finding deep deposits if the country is to remain a leader in global exploration, increase its metal reserve base, and sustain the economic benefits the industry creates for all Canadians. As Schodde concludes, neither mining companies nor the government can afford an industry in hibernation. The time to act is now. **c**

Virginia Heffernan is the principal of GeoPen communications and a science and business writer who specializes in mineral and energy resources.

GOING ABROAD

A look into the Government of Canada's plan to boost international trade and expand Canada's global business footprint.

BY KATHLEEN NAPIER

Last November, the Honourable Ed Fast, Canada's Minister of International Trade, took the stage at the Economic Club of Canada in Ottawa to roll out the federal government's *Global Markets Action Plan: The Blueprint for Creating Jobs and Opportunities for Canadians Through Trade (GMAP)*.

In his address, Minister Fast told the audience that the Conservative government is committed to strengthening its support for Canadian companies and investors that are conducting business abroad. "[The plan] will concentrate its efforts on the markets that hold the greatest promise for Canadian business," noted Fast during his presentation. "The plan will play to our strengths and ensure that all diplomatic assets of the Government of Canada are harnessed to support the pursuit of commercial success by Canadian companies and investors."

GMAP is being heralded as the start of a new evolution in Canada's international trade priorities. The plan is a strategic framework that aims to open up targeted market opportunities and help more Canadian businesses engage in new and expanded export activities in these strategic markets. In doing so, the plan aims to ensure that Canada's trade policy tools work effectively to maximize the benefit to Canadian workers and businesses.

The Canadian Trade Commissioner Service (TCS) is an example of one of these tools. The TCS, which falls under the organizational umbrella of the Department of Foreign Affairs, Trade and Development Canada, has been helping Canadian businesses and organizations succeed globally for 120 years. With trade offices across Canada and 160 around the world, the Canadian TCS provides support to Canadian companies abroad in order to help them work effectively and responsibly in international markets.

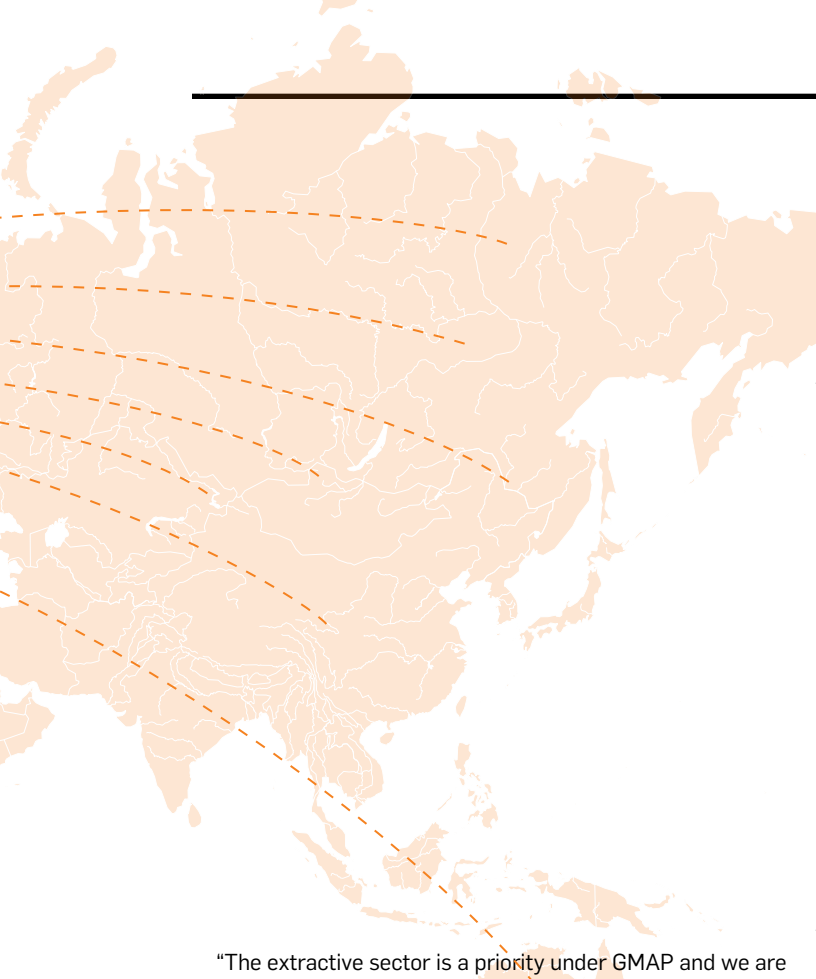
Tasked with promoting Canada's economic interests in the global marketplace, the TCS hosts programs for both Canadian companies looking to work in foreign markets as well as foreign businesses interested in investing in Canada.

One in five Canadian jobs is linked to exports and trade and "opening new markets to boost Canadian exports is key to creating jobs and opportunities for hard working Canadians in every region of the country," explained Minister Fast during a trade mission to Africa in June.

Canada's mining industry is at the forefront of the global market. In 2012, the TMX alone accounted for 70 per cent of global mining equity financing, making Canada a leading mining nation. Over the last five years, Canadian-based companies have consistently accounted for roughly 40 per cent of global exploration expenditures.

"Canadian extractive companies are world leaders, but they are not immune against the challenges of investing and operating abroad. They have to adapt to foreign business and regulatory environments, engage host communities, and remain mindful of Canadian legislation and international guidelines," Minister Fast said in an interview with the PDAC.

The Government of Canada has taken steps to minimize the risk of Canadian companies doing business overseas with the support of on-the-ground advisors helping businesses navigate their way through local markets. The advisors offer tools, resources on socially and environmentally responsible business practices (such as the PDAC's *e3 Plus Framework for Responsible Exploration),* key intelligence and guidance on foreign markets, in addition to identifying possible partnership opportunities.



"The extractive sector is a priority under GMAP and we are committed to making sure that all of our trade promotion resources, like TCS, are harnessed to support Canadian extractive companies around the world," adds Minister Fast.

Foreign Investment Promotion and Protection Agreements (FIPAs) are another tool used by the government to protect Canadian investments abroad. FIPAs are bilateral agreements between Canada and host countries that follow international arbitration guidelines a Canadian investor and a host country will use to resolve disputes. The agreements help contribute to the creation of stable operating environments for Canadian exploration and mining companies abroad, while also reducing risks that may arise from political instability, regulatory uncertainty, and resource nationalism.

Canada currently has 27 FIPAs in place around the world. In 2013, Canada reached a single-year record by concluding, signing or bringing 10 FIPAs into place. Seven of the agreements brought into effect are with Cameroon, Côte d'Ivoire, Guinea, Nigeria, Zambia, Benin and Tanzania.

"We know that companies that use our services have a higher rate of success when exporting," says Minister Fast.

According to the Ministry of International Trade, companies that use TCS services have access to 36 per cent more markets and their exports are valued 18 per cent higher than companies that go it alone.

This past June, 26 delegates from 19 mining, oil and gas, power and renewable organizations, travelled with Minister Fast on a 10-day, four-country trade mission to Africa. The group made stops in Burkina Faso, Madagascar, South Africa and Tanzania, four sub-Saharan African countries identified as priority markets under the Canadian Government's Global Markets Action Plan.

The trade mission focused on bilateral opportunities between Canadian and African companies in the renewable energy and extractive sectors. PDAC President Rod Thomas joined Minister Fast on the South Africa and Tanzania leg of the journey. "The Government of Canada has been a strong advocate and partner to the extractive sector over the years," says Thomas. "Initiatives like this trade mission demonstrate the government's continued support for growth and investment in our sector. It's clear they understand the importance of our industry to Canada's growing economy and they are standing behind us."

Thomas took part in a business roundtable led by Minister Fast, attended the Renewables & Mining Summit, and participated in a panel discussion on investment and partnership opportunities in the industry during the trade mission.

June's trade mission to Africa was one of two for Minister Fast this summer who also hosted a large contingent of Canadian extractive companies to South America. He believes delegates who join him on trade missions can benefit greatly by gaining first-hand experience in foreign markets and participating in business meetings.

"Trade missions are about opening doors, liaising with key decision-makers, and developing strategic long-term trade and investment relationships," says Minister Fast.

During his address to The Economic Club of Canada in Ottawa last November, Minister Fast explained that the GMAP uses an "economic diplomacy" approach to promote trade activities. The approach, which is being used throughout its international diplomatic network, is designed to highlight Canada's economic interests around the world.

Through trade policy tools and resources like FIPA and the TCS, the Government of Canada is able to open up foreign markets to Canadian businesses and provide on-ground support to ensure companies can expand and succeed abroad. Such opportunities are an essential part of finding new opportunities and further expanding Canada's mineral exploration and development industry, and for ensuring that it remains a global leader. **c**

Kathleen Napier is the PDAC's Coordinator of Public Relations & Social Media.

PDAC President Rod Thomas (top row, first on the left) travelling with the Honourable Ed Fast, Minister of International Trade, and Canada's delegation in Africa.

S-IMEW 2014: Beyond the classroom

SINCE ITS INCEPTION IN 2007, S-IMEW HAS GIVEN STUDENTS A REAL-LIFE INDUSTRY EXPERIENCE. NOW IT IS A MUST-ATTEND EVENT FOR LAUNCHING CAREERS.

BY KATHLEEN NAPIER

As a child growing up in China's Sichuan province, Ce Shi regularly visited the geology museum at the Chengdu University of Technology. The museum sparked a childhood love of rocks and minerals that quickly grew into a hobby, and that eventually lead Shi to pursue his passion for mineral exploration at the University of British Columbia (UBC).

This past spring, Shi (pictured in the centre of the opposite page) was one of 26 students who travelled to Sudbury, Northern Ontario's mining mecca, for the PDAC's two-week Student-Industry Mineral Exploration Workshop (S-IMEW). The eighth annual workshop was held this year from May 3-16.

S-IMEW brings 26 of Canada's top geoscience students together with industry professionals to learn practical, in-field experience. Students attend lectures and participate in field training sessions ranging from exploration and mapping techniques to corporate social responsibility.

Shi believes the two week in-field workshop enhanced his classroom learning. "Although I took field courses in university and made small-scale maps, the S-IMEW mapping days greatly expanded my knowledge about mapping," says Shi. "I learned about how government geoscientists make maps, determine rock contacts, and important traces that need to be found for exploration purposes."

Mapping techniques are an important tool of the trade in the exploration industry and a skill students are taught at S-IMEW. "Good maps are hard to create but fundamental to our science and business," says Richard James, Earth Sciences Professor at Laurentian University. "Collecting the critical field data is difficult to say the least, so we need to learn to do it very well and enjoy doing it."

James, a S-IMEW veteran, has been with the program since its inception in 2007 and has been an integral part of developing S-IMEW's programming over the years, including leading the field trip portion of the workshop. This year James travelled with the students to the Abitibi Greenstone Belt along the Ontario-Quebec border to tour the Malartic Mine in Osisko, as well as to Integra Gold's Lamaque property in Val d'Or. The group also travelled to Quebec to tour the Noranda camp.

As a professor, James understands the important role a workshop like S-IMEW plays in preparing students for a career in the mineral exploration and development industry. "The program focuses on the more applied side of the exploration industry that is not possible to adequately address in the typical university undergraduate program. Much of the program occurs in the field where classroom information is used to address real problems," says James. "The major reason for the program in my mind is interfacing people in industry with graduating students where the industry can meet and attract future employees."

A study released earlier this year by the Mining Industry Human Resources Council (MiHR) and the PDAC recommended that Canada's exploration industry needs to take significant steps in order to improve student field training programs to heighten recruitment and retention of geoscientists. It is estimated that Canada's mining and exploration industry will need to fill close to 140,000 mining-related jobs within the next decade. "The skilled labour shortage we're facing as an industry is very real," says PDAC President Rod Thomas. "Recruiting and retaining geosciences graduates will play an important role in closing the skills gap in our industry."

"There is roughly $140 billion worth of projects in the permitting and environmental assessment phase," adds Ryan Montpellier, MiHR's Executive Director. "If only a small proportion of these mines come online it will mean a significant increase in the number of people that the mining industry will need, adding to the significant gap that retiring workers will soon create." According to MiHR, ensuring today's graduates stay in the field to eventually fill the intermediate and senior level jobs that will become available as people begin to retire is a crucial step for the industry. Filling the pipeline of skilled labourers is as important to the industry as discovering new deposits to be developed because projects require the management and guidance of experienced professionals to maximize safety and efficiencies.

For the past eight years, Rick Hutson has presented on careers in geoscience at S-IMEW. Hutson, a Senior Recruitment Consultant with C.J. Stafford & Associates, has spent over 30 years working in the natural resource sector, managing assignments and projects in Canada, USA, New Zealand, Australia, Myanmar, Vietnam, Kazakhstan and Turkey. Career Development Day includes a talk about careers, networking and resumes.

One of the advantages of the program, according to Hutson, is the introduction to the 'real world' of business during the workshop. "S-IMEW gives the students exposure to all aspects of the exploration industry and gives them an

opportunity to interact and network with 80 industry professionals," says Hutson. "One of my favourite parts of the program is watching the interaction of the students with some of the industry and watching them begin to get comfortable and grow in their networking and interaction skills. Only S-IMEW can pull industry professionals together to donate their time and expertise year after year to developing the up and coming talent."

The S-IMEW network isn't limited to the two-week workshop. Karen Gray landed her first job after graduating from the University of New Brunswick through a contact she originally met at S-IMEW 2009. Four years later, Gray is still a Geologist at A.C.A. Howe International Limited. "Aside from the educational aspect of S-IMEW, I found that the networking opportunities were equally beneficial, if not more so," says Gray.

While the two-week workshop brings industry professionals and students together, it also creates a network of the next generation of geoscience professionals. "I have stayed in contact with many of the students in my S-IMEW year, and a few from other years," notes Gray. "As the years go by we lose touch a little bit, but it's always great when we can reconnect at PDAC."

As a new graduate from the University of British Columbia, Ce Shi is now working as a junior geologist at Good Mining Exploration Inc. in Northern Ontario. He plans to work for a few more years before applying to a master's program. "My advice to students in their first or second year is to try to study geosciences in the field. The more you see in the field, the better you do with textbooks," says Shi. "And go to any kind of mining conference, convention, or workshop available, and talk to as many people as possible."

That idea of gaining valuable fieldwork experience and working and speaking with seasoned professionals about the types of skills and opportunities available within the industry is what S-IMEW is all about. And for people like Ce Shi, it is hopefully the launching point for a long and successful career. **c**

Kathleen Napier is the PDAC's Coordinator of Public Relations & Social Media.

CLOCKWISE FROM TOP LEFT: Students Stephanie Yager, Emma Percy and Robin Fox; Lake sediment sampling techniques with the OGS on Ramsey Lake; Pb fire-assay technique with Troy Richardson that is used in the Geoscience Laboratories; S-IMEW 2014 group photo with staff from the Earth Resources and Geoscience Mapping Section MNDM; Government mapping day group leader Ben Berger with Rachel Dockman.

Photo credit: Marg Seregelyi

WHAT I LEARNED AT S-IMEW 2014

JONATHAN BERTHIAUME, UNIVERSITY OF REGINA

- My geology degree taught me a great deal about the science behind rocks and minerals, but it didn't teach me how to apply that knowledge to industrial pursuits. S-IMEW helped to bridge that gap and show me how and where geology fits into mineral exploration alongside geochemistry and geophysics.
- The field trips to world-class deposits led by top academics were incredible. Sudbury, Val D'Or, and Rouyn-Noranda are places I've studied in classes but seeing and feeling the geology firsthand was fascinating.
- The social aspect of S-IMEW is something I'll never forget. I met fellow students from all across Canada who have a genuine interest in mineral exploration, and industry executives: CEOs, COOs, lead geologists and people that I wouldn't ordinarily have the opportunity to meet. Having conversations with these powerful, successful industry executives taught me to ask questions, and to be confident.
- S-IMEW has given me confidence in my career choice, opened new doors and provided contacts that can help me reach my goals.

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PDAC 2015 CONVENTION

The PDAC's 83rd Convention is just around the corner. Check out the latest news!

INTRODUCING

TRADE SHOW NORTH!

PDAC is pleased to announce that we will be expanding our Trade Show exhibit space into the Metro Toronto Convention Centre (MTCC) North Building!

The Trade Show will now encompass Hall C of the North Building, as well as Halls D and E of the South Building.

With the expansion into the North Building, Priority Renewal Exhibitors who wish to relocate or secure a larger booth space may have the opportunity to do so. PDAC may also have more space available to offer New Exhibitors.

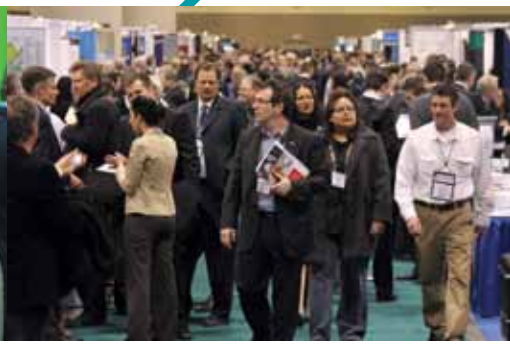

Photo credit: envisiondigitalphoto.com

TRADE SHOW NORTH: A SNEAK PEAK!

Complimentary access to the Trade Show North in the inaugural year

Attendees can visit the Trade Show North with all pass types including the complimentary Investors & Select Presentations Pass.

Core Shack

The Core Shack will be located in Hall C for PDAC 2015.

PDAC's Core Shack has long been a highlight of the convention, drawing large crowds. The Core Shack provides a venue for drill stage projects that are generating exciting new results to display their core samples and discuss the results with interested attendees.

Great North Eatery and The Beer Market

Located on the newly expanded Trade Show floor of the North Building, the casual atmosphere of the Eatery is sure to be a destination of choice for attendees looking for a place to eat, relax, unwind and network in a social setting. The Beer Market, adjacent to the Eatery, will add a chic vibe with its upscale furnishings and décor. The Beer Market will transform this sophisticated area into an outdoor oasis, perfect for informal meetings, mingling and networking.

Trade Show Receptions

Monday, March 2 and Tuesday, March 3 from 3:00 to 5:30 pm

Enjoy a glass of wine or beer as attendees and exhibitors network on the Trade Show North floor.

Welcome Reception Sunday, March 1 at 6:00 pm

The largest networking event at the PDAC 2015 Convention will now take place on the Trade Show North floor. Join us for a welcome drink and light refreshments at this event, which previously took place at the Fairmont Royal York.

EXHIBIT OPPORTUNITIES

Trade Show and Investors Exchange

New Exhibitor application forms became available as of Thursday, August 28. Once priority renewal assignments have been completed, all unrenewed exhibit space will be assigned to New Exhibitors on a first-come, first-served basis.

Core Shack

Why not display your maps and technical information alongside your best rock samples in the newly located Core Shack in Hall C of the North Building? The Core Shack provides a venue to display core samples from drill stage projects that are generating exciting new results and discuss results with interested attendees. Demand is high for these complimentary two-day booths, and the deadline to apply is Monday, November 17.

Prospectors Tent

Located in the Investors Exchange, the Prospectors Tent is a great opportunity for self-employed or independent prospectors to display their maps, samples and claim results.

Applications will be available in the Fall and are processed on a first-come, first-served basis.

EXTENDED SHOW HOURS

Show hours will be extended during PDAC 2015.

Sunday, March 1	10:00 am - 6:00 pm
Monday, March 2	10:00 am - 6:00 pm
Tuesday, March 3	10:00 am - 6:00 pm
Wednesday, March 4	9:00 am - 2:00 pm

PRESENTATION OPPORTUNITIES

Presentation & Reception Rooms

Presentation Rooms are a great way to launch a product, present a workshop, meet clients and prospects and/or make a presentation about your mining jurisdiction or country. Presentation Rooms can accommodate up to 200 people and are available for half- and full-day rentals. Reception Rooms are ideal for small receptions of 50 to 100 people and can be rented in two-hour slots.

All Presentation & Reception Rooms are located in the

North Building of the Metro Toronto Convention Centre and will be available for rental from March 1 to 4, 2015.

Rental fees include several benefits to enhance your organization's visibility.

Presentation & Reception Room applications became available as of Friday, September 12). Applications are processed on a first-come, first-served basis.

Open Session

PDAC invites policy and technical abstracts for presentation during the Open Session. There is no fee to participate and all interested individuals are welcome to apply. The types of abstracts chosen for presentation vary from year to year. Presentation slots are 25 minutes in length.

Applications will be available in the Fall, and the deadline to apply is Friday, November 14, 2014 at 5:00 pm (EST).

SPONSORSHIP OPPORTUNITIES

Building Your Brand at Convention

If your goal is to enhance your organization's image as an industry leader, reach your target market, differentiate your company from its competitors, or showcase your organization to key investors, then the PDAC Global Sponsorship & Marketing Program is for you. Our comprehensive programs are designed to enhance your corporate profile through diverse pre-convention, onsite and post-convention marketing initiatives.

NEW OPPORTUNITIES FOR 2015

Trade Show Receptions

Located in the Trade Show North, the Trade Show Receptions on Monday, March 2 and Tuesday, March 3 will offer significant PDAC networking opportunities for attendees and exhibitors to meet informally and discuss business objectives. All Access Pass holders and Trade Show Day Pass holders will be treated to a complimentary drink ticket courtesy of the sponsoring company. The exclusive sponsor's logo will be displayed at each bar. Bars will be strategically placed in aisles throughout the exhibit hall, allowing an easy flow for networking and casual conversation.

This is an exclusive opportunity to partner with PDAC in welcoming global attendees to the industry's largest Convention and to promote your company at PDAC 2015.

Promotional Items

In response to attendee requests, the PDAC will produce select specialty items that will be distributed in over 10,000 All Access Pass convention registration bags at PDAC 2015. Attendees will have quick and convenient access to branded hand sanitizer, chewing gum, mints, a USB car charger and more. Picture your company's logo on one of our official PDAC 2015 promotional items. This is an amazing opportunity to showcase your brand, corporate messaging and build awareness.

To view PDAC 2015 sponsorship opportunities, visit: **www.pdac.ca/convention/sponsors/opportunities**

For a customized sponsorship package to meet your marketing objectives, contact Christina Goncalves Toste at **sponsor@pdac.ca**.

PROGRAMMING

PDAC 2015 Technical Program Themes

Hear industry experts share timely insights during this dynamic series of presentations. Attendees will learn next and best practices that can be utilized right away. Themes include:

- Adopting tools and techniques from the oil patch
- Bringing renewable energy to your project
- Closing the discovery gap: The role of innovation
- Commodities and market outlook
- Diamonds are forever: Canada's turn
- Europe/Fennoscandia
- Geophysics
- ¡Viva! - Mineria en Mexico
- Jackpot at 550 Ma: Copper belt
- Keynote session
- Managing the environmental footprint of mineral exploration
- Mineral study at the core of geometallurgy
- Mining in Latin America: Exploration, operations and investment
- New discoveries and developments
- Nickel: A global review
- Promoting mineral exploration and development in Canada's North

- Quebec and Plan Nord
- Return of the state: The role of government in financing mineral exploration
- Specialty metals and industrial minerals
- The economics of grade

SOCIAL EVENTS

Awards Evening Monday, March 2

Outstanding achievements are honoured at the prestigious PDAC Awards Evening on Monday, March 2, where individuals and organizations are acknowledged for their significant contributions to the Canadian mineral industry. This hallmark event begins with a hosted reception, followed by a delectable three-course dinner, fine wine and live jazz music. A specialty Coffee-and-Liqueur Networking Reception rounds out this memorable evening.

Ticket price: $125 per person, HST included
Table of 10: $1,125, HST included
Buy a table of 10 and SAVE $125!

Surf's Up Soirée! (Gala) Wednesday, March 4

Slip on your flip flops, throw on your shades and beat those winter blahs at the Surf's Up Soirée!

Enjoy the reception, dive into the sun-sational dinner, and heat up the dance floor, jammin' to live entertainment. Win big at Caribbean Stud Poker in the Casino! Make waves and dress to impress, in upscale summer attire. You could win the Best Dressed Contest! Cut offs, short-shorts and swim suits not permissible.

Ticket price: $125 per person, HST included
Table of 10: $1,125, HST included
Buy a table of 10 and SAVE $125!

Luncheons

Join us at the Mineral Outlook Luncheon on Monday, March 2, or the Panel Luncheon on Tuesday, March 3—or both—during the PDAC 2015 Convention. Current hot topics that have captured media attention in the last year are sure to be discussed and debated.

Ticket price: $80 per person, HST included

For more information on PDAC 2015, visit:
www.pdac.ca/convention
or email **convention@pdac.ca**.

Attendee registration opens December 2014

International Convention, Trade Show & Investors Exchange

March 1 - 4
Metro Toronto Convention Centre
Toronto, Canada

Registration begins December 2014
www.pdac.ca/convention

For more information, contact:
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Q&A

Since 2007, the PDAC has provided insurance programs to our 10,000 members who operate in Canada and around the world. Through our three insurance partners—Integro Insurance Brokers, Partners Indemnity Insurance Brokers and Sterling Capital Brokers—members have the ability to choose from a variety of insurance programs that can be tailored to meet their specific needs, including a Consultants Package, Mining/Contractors Package and Group Benefits Program. What follows is some insight from each of the insurance firms about the uniqueness of insurance coverage for the mineral exploration and development sector.

COVERING

Q. How has your insurance program been tailored to meet the needs and demands of PDAC members?

Integro/Partners Indemnity There are certain basic fundamentals associated with mining, but every mining company or consulting geoscientist is different and each has its own distinct risk profile. Factors such as public vs. private, production vs. exploration, individual consultant or consulting firm, above ground vs. below ground, geography, political environment, Board of Directors' risk tolerance, financial stability, price of metals and lender's requirements all play a role in shaping a mining company's or consultant's risk profile and their corresponding risk management approach.

Insurance is only one aspect of an overall risk management strategy, but for it to be effective an insurance program has to be designed to appropriately address the specific risk factors facing an organization so that it is neither under-insured nor over-insured. There is no "one-size-fits-all" solution for the mining industry. Therefore, we design a bespoke insurance program for every PDAC member we work with that addresses their specific risk profile.

Sterling The answer begins and ends with our brokerage services. Sterling Capital appreciates that no two PDAC members are alike. Each has their own unique needs and demands that vary widely, from newly launched enterprises to mature organizations that operate across the globe. However, what all PDAC members have in common are practical issues that can only be solved by a broker who asks good questions and comes prepared with a perspective that allows us to connect PDAC members to solutions not accessible by the general public. For example, do you need a cross-border disability program that recognizes the reality that your key employees travel to areas that many insurance carriers deem dangerous? We have you covered. Or do you need to lock in your program costs for three-to-five years as you roll out your business and re-invest capital into growth? We have a solution for that. Perhaps you need a program that leverages the international scope and size of your company into material savings in both time and money through economies of scale at home? No problem, we have you covered.

Q. What are some of the unique characteristics or requirements of our members that you have to deal with when it comes to their insurance coverage?

Integro/Partners Indemnity As mentioned in the previous section, each mining risk has unique insurance requirements and we therefore customize a solution to align with their specific business needs. However, one pervasive business need affecting many mining organizations and professionals in this current economy is preservation of cash. Although our efforts are always aimed at reducing "total cost of risk" (a combination of premiums, deductibles and uninsured losses), there is greater emphasis now on

Q&A

YOUR BASES

streamlining an insurance program in order to minimize premium spent while maintaining a minimum level of protection. In addition to structuring a cost effective insurance program to preserve cash, we also investigate effective premium finance options (another source of capital) and arrange for multi-year placements to assist with budgeting purposes.

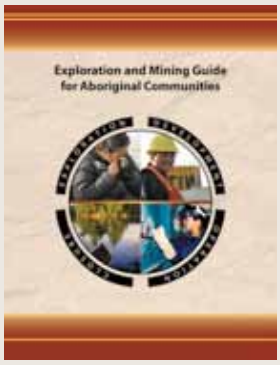
Sterling Most notably, our experience with PDAC members has shown that the typical brokerage services available in the market produce only one-dimensional solutions, as they cover members only in Canada. The travel coverage was consistently inadequate, leaving employees with hefty travel schedules at the mercy of an insurance carrier at the time of claim. Employees not headquartered out of Canada were rarely afforded similar coverage. And when members did use a local or multinational consultant to build a plan, they were rarely able to provide the combined reporting that the head-office team needed to effectively understand, manage and run their entire program. Solutions for these types of issues simply did not exist on the market. Through our strong relationships with key carrier partners, Sterling Capital is able to build customized plans that work for the unique and specialized needs of PDAC members.

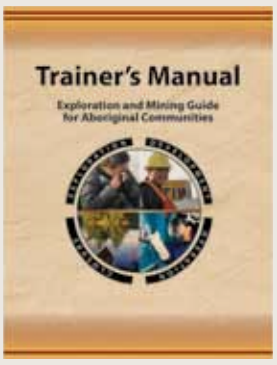
Q. Going forward, what areas of your insurance program are you looking to expand or improve upon for our members?

Integro/Partners Indemnity Historically, Canadian mining organizations have proliferated operating in relatively benign jurisdictions and traditional insurance products have, generally speaking, adequately addressed the risks they face. Nowadays, however, and more so into the future, in order to discover new, economically viable ore bodies Canadians are having to explore and operate in far more remote, complex and hostile environments. To keep pace with this everchanging, and perhaps worsening risk landscape, we have developed specialty insurance products and risk management services that address burgeoning risks associated with hostile environments—accidental death and dismemberment, kidnap, ransom, extortion, political and medical evacuation, political violence and use of weapons and employer's liability as respects the health and safety of personnel in hostile environments.

Sterling With recent input and feedback from PDAC members that use our services, we streamlined and improved our online enrollment system. This will provide members across the globe with a single interface to not only enroll onto a program that meets local benefit plan goals, but also allows the ad-hoc purchase of locally appropriate additional insurance. That could be critical illness, additional travel insurance or even specialized indemnity products that keep the corporation and the employee protected. The other, more obvious impact is that this allows a PDAC member to run a report at the touch of a finger and have a global understanding of precisely what their global benefits program is doing, and whether it is meeting their corporately defined goals. **c**

For more information on the PDAC's insurance programs, visit our website at:
www.pdac.ca/members/insurance





RAISING AWARENESS, BUILDING CAPACITY: INFORMATION TOOLS FOR ABORIGINAL COMMUNITIES

BY LESLEY WILLIAMS

One of the key challenges facing the minerals sector is a general lack of understanding surrounding the mineral development sequence by members of the public and Aboriginal communities near projects, particularly as it relates to the various activities, financing, potential impacts, and opportunities presented as a project develops. This information gap can sometimes create confusion and misconceptions, and negatively impact the ability to build strong, positive relationships and partnerships with communities. More importantly, Aboriginal community awareness and understanding of the mineral development cycle—from mineral exploration, mine construction, operations and mine closure—are critical for maximizing community participation in the mineral sector and the economic opportunities it can provide.

To help support the engagement efforts of companies and increase Aboriginal participation in the minerals industry, the PDAC partnered with Natural Resources Canada, Aboriginal Affairs and Northern Development Canada, the Mining Association of Canada, and the Canadian Aboriginal Minerals Association to develop information tools for raising awareness and building capacity.

Developed in 2006, and subsequently updated and renamed in 2013, the *Exploration and Mining Guide for Aboriginal Communities (Guide)* aims to help Aboriginal communities across Canada better understand exploration and mining development. The *Guide* offers practical information about the main phases and activities involved in mineral development, including examples of community experiences, along with regulatory, economic, environmental and social aspects of the sector as they relate to Aboriginal people. It has been used by companies as an entry point into the workings of the industry when meeting community members, as well as in training institutions and by community representatives.

The *Trainer's Manual* was launched at the PDAC 2014 Convention as a companion tool that could help provide guidance on how to deliver workshops or information sessions based on the *Guide*. The *Trainer's Manual* offers a step-by-step, participatory workshop format for delivering the content. Aboriginal communities can use the *Manual* as a tool to present information about the minerals sector to community members themselves, helping people to learn about the industry and related opportunities and contribute to building community capacity to participate.

PARTNERING FOR SUCCESS

The PDAC, Natural Resources Canada and the Council for the Advancement of Native Development Officers (Cando) have signed an agreement to partner to facilitate information sharing and to raise awareness of the opportunities for Aboriginal people that arise from mineral exploration and mining in Canada, particularly in the area of economic development. The partners will promote and utilize tools and resources such as the *Guide* and the *Trainer's Manual* through their respective networks and joint events to assist with raising awareness of the opportunities for greater participation by Aboriginal people in the mineral industry. The first of these will be an "Exploration and Mining 101" workshop in September. It will be presented in conjunction with the Cando annual conference at the Vancouver Island Conference Centre as a professional development workshop for Aboriginal Community Economic Development Officers.

ADAPTATIONS ABROAD

Since the original launch in 2006, the *Guide* continues to grow in use and popularity—it has even taken on an international flavour. A number of countries and regions around the world have imported the tool and used it in its original form, including the Philippines, Norway, Guatemala, Democratic Republic of Congo, Ecuador, and throughout West Africa. Several other countries have taken the *Guide* and adapted it to local contexts. Mexico, Colombia, Mongolia, Chile, Guyana and Peru have each developed distinct versions of the *Guide* in order to reach the Indigenous communities and stakeholders that are impacted by projects and raise awareness about the mineral development sequence. c

Lesley Williams is the PDAC's Manager of Aboriginal Affairs & Resource Development.

"Aboriginal community awareness and understanding of the mineral development cycle is critical for maximizing community participation in the mineral sector and the economic opportunities it can provide."

CORE

The Voice of Mineral Exploration
Fall 2014